TRI-COUNTY SERVICE CENTER

Tri-County Commercial Phased Project Matrix



Department of Consumer & Business Services **Building Codes Division • Tri-County Service Center**123 NE Third Ave., Ste. 440, Portland, OR 97232-2901

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www.oregonbcd.org

PROJECT IN	ΙFΟ	RMATION		
Project name:				Date:
Project address:		City:	State:	ZIP:
Scope of work:				
Reference no.:	Ма	p and tax-lot no.:		
Contact person/name:	Со	mpany:		
Phone:	Се	llular:		
Fax:	E-r	nail:		

NOTES AND INSTRUCTIONS

- The purpose of this matrix is to help an applicant plan for and prepare complete submittal packages for a phased project. A pre-submittal conference may be required by the jurisdiction or requested by the applicant to discuss the desired phasing. Plan review will not take place until a complete package is submitted for the requested phase.
- This matrix can be used for all commercial construction projects, including new construction, additions, alterations, and tenant improvements (TIs). In unique circumstances, additional phases may be considered when approved by a building official.
- For complex projects, applicants should use the "location" space to note the item's location and page number from the plans or the specification book.
- It is not necessary to duplicate submittal information, if it is requested in multiple sections.
- A box with an X indicates that the information is typically required for plan review for the phase requested. A required item may be deferred for later submittal when approved by the local building official.
- 🖾 "P" means "provided" *or* the plans examiner is requesting that you provide it. 🖎 "NA" means "not applicable" to your project.
- Building, mechanical, electrical, and plumbing permits may be issued together or as required for the phase.
- Costs associated with the phasing of projects will be charged according to the standard Tri-County fee method.
- Construction work will not begin before issuance of appropriate permits, nor will it extend beyond the approved phase.
- Permits for phased projects are issued based on the information provided. Design assumptions are acceptable. The owner assumes risks associated with phased permitting if this information is incomplete or inaccurate.

PRE-SUBMITTAL PROCESS

An applicant may request a pre-submittal meeting with representatives of the jurisdiction in which the project will be built. The meeting may take place during the conceptual, schematic, or in-progress phase, or when the applicant has completed plans.

INDEX OF CHECKLIST SECTIONS 1. General Project Page 2 7. Mechanical: I & II Kitchen Hood Permits Page 5 2. Civil Page 2 8. Plumbing Page 6 3. Architectural Page 3 9. Electrical Page 7 4. Structural Page 3 10. Fire Suppression Page 8 5. Mechanical: New construction Page 4 11. Fire Detection and Alarm Page 8 6. Mechanical: Additional/replacement rooftop equipment installation permits Page 5 12. Re-Roof Installation Page 10



PHASED PROJECT MATRIX												
			Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI				
SECTION 1 – GENERAL PROJECT DA	TA											
Construction Documents												
1.1 Number of sets of plans	Req	uired	X	X	X	X	X	X				
1.2 Cover sheet title block	Req	uired	X	X	X	X	X	X				
1.3 Cover sheet vicinity map	Req	uired	X	X	X	X	X	X				
1.4 Cover sheet plan index	Req	uired	X	X	X	X	X	X				
1.5 Code summary	ПP	□ NA			X	X	X	X				
1.6 Deferred submittal summary	ПP	□ NA				X	X	X				
1.7 Professional stamp and signature	□P	□NA	<u> </u>	X	X	X	X	X				
1.8 Fire-and-life-safety plan	ПP	□NA	. 🗆				X	X				
1.9 Landscape plan	ПP	□NA	. 🗆				X	X				
1.10 Landscape specifications	ΠP	□NA	. 🗅				X	Xì				
Supporting Documents												
1.20 Land use or planning actions	ΠP	□NA	X X	X	X	X	X	X				
1.21 Required fire-flow calculations	ПP	□ NA		X	X	X	X	X				
1.22 Fire hydrant flow-test report	ПP	□NA	. 🗆			X	X	Xì				
1.23 Fire department or fire district building survey report	ПP	□ NA				X	Xì	X				
1.24 Material safety data sheets (MSDS)	ПP	□ NA	. 🗆					X				
SECTION 2 - CIVIL DATA												
Construction Documents												
2.1 Site plan	Req	uired	X	X	X	X	X	X				
2.2 Site utility plan	Req	uired		X	X	X	X	X				
2.3 Grading plan	Req	uired					X	X				
2.4 Erosion control plan	Req	uired	X	X	X	X	X	X				
2.5 Utility vault location and details	ПP	□NA	. 🗆	X	X	X	X	X				
Supporting Documents												
2.20 Geotechnical/soil engineer report	ПP	□ NA	X X	X	X	X	X	X				
2.21 Storm water calculations	□P	□ NA		X	X	X	X	X				
2.22 Site retaining wall structural calculations	ПP	□NA		X	X	X	X	X				
2.23 Assurance of compliance with environmental rules	ПP	□NA						X				



			Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
SECTION 3 - ARCHITECTURAL DATA	4							
Construction Documents								
3.1 Floor plan(s)	Req	uired					X	X
3.2 Transverse and longitudinal cross sections	Req	uired					X	X
3.3 OSSC Chapter 11 accessibility requirements	Req	uired						X
3.4 Interior elevations	□Р	□NA	. 🗆				X	X
3.5 Exterior elevations	□Р	□NA	. 🗆		X	X	X	X
3.6 Roof plan	□P	□NA	. 🗆				X	X
3.7 Wall type sections and details	ПP	□NA	. 🗆				X	X
3.8 Reflected ceiling plan(s)	ПP	□NA	, <u> </u>				X	X
3.9 Fire-rated construction details	ロР	□NA	, <u> </u>				X	X
3.10 Energy-code-compliant construction details and specifications	ПP	□NA					X	X
3.11 Door schedule	ПP	□NA	. 🗆				X	X
3.12 Glazing schedule	ПP	□NA	· 🗆				X	X
3.13 Furniture plan	□P	□NA	. 🗆				X	X
Supporting Documents								
3.20 Energy-code-compliance forms and calculations	ПP	□NA	. 🗆				X	X
3.21 Material safety data sheets (MSDS)	ПP	□NA	. 🗆				X	X
3.22 Hazardous materials inventory schedule (HMIS)	□P	□NA	. 🗆				X	X
3.23 Hazardous materials management plan (HMMP)	ПP	□NA					X	M
3.24 Written fire-and-life-safety evacuation plan for area of rescue assistance	ПP	□NA					X	X
3.25 Active and passive smoke-control information	ПP	□NA	. 🗆				X	X
SECTION 4 - STRUCTURAL DATA								
Construction Documents								
4.1 Structural cover sheet	Req	uired						X
4.2 Foundation plan and details	ロР	□NA	. 🗆		X	X	X	X
4.3 Under-slab mechanical plan	ПP	□NA	. 🗆		X	X	X	X
4.4 Under-slab electrical plan	ПP	□NA	. 🗆		X	X	X	X



				Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI			
4.5	Under-slab plumbing plan	ПP	□NA			X	X	X	X			
4.6	Floor framing plan	□P	□NA				X	X	X			
4.7	Roof framing plan	□P	□NA				X	X	X			
4.8	Structural elevations	ПP	□NA				X	X	X			
4.9	Structural details and cross-sections	□P	□NA				X	X	Ø			
4.10	Standpipe information	□P	□NA			×	X	X	Ø			
4.11	Special inspection / structural observation matrix	ПP	□NA	. 0			Ø	X	Ø			
Supp	oorting Documents											
4.20	Geotechnical/ Soil engineer report	ロР	□NA		X	X	X	X	X			
4.21	Site-specific seismic hazard report	ПP	□NA		X	X	X	X	X			
4.22	Design narrative	ПP	□NA	X		X	X	X	X			
4.23	Structural calculations	ロР	□NA			X	X	X	X			
SECTION 5 – MECHANICAL: NEW CONSTRUCTION DATA												
Cons	struction Documents											
5.1	Floor plan	Req	uired					X	X			
5.2	Equipment schedule	Req	uired					X	X			
5.3	Site plan	ПP	□NA					X	X			
5.4	Under-slab mechanical plan	□P	□NA			X	X	X	X			
5.5	Roof plan	ПP	□NA					X	X			
5.6	Fuel-gas-piping plan	□P	□NA					X	X			
5.7	HVAC equipment and duct plan(s)	ПP	□NA					X	X			
5.8	Roof access details	□P	□NA					X	X			
5.9	Duct smoke-detector locations	□P	□NA					X	X			
5.10	Fire/smoke damper locations	□P	□ NA					X	X			
5.11	Smoke-control plan	ПP	□NA					X	X			
5.12	Outside air (OSA) table	ПP	□NA					X	X			
5.13	Refrigeration equipment and piping plan	□P	□NA					X	X			
5.14	Kitchen equipment plan	ПP	□NA					X	X			
5.15	Type I and /or II kitchen hood plan (See Mechanical Data 7.0)	ПP	□ NA					X	X			
5.16	Fume/vapor hood plan	ロР	□ NA					X	X			
5.17	Process piping/product and/or exhaust-conveying duct plan	ПP	□NA					X	X			



		Excavation & shoring	Site utilities & grading	/ slab	Structural frame	Shell	Build out/ TI
5.18 Fire-rated construction details	P D NA	\				X	X
5.19 Equipment hanger/fastener details 🔲	P 🗆 NA	\				X	X
Supporting Documents							
5.20 Structural calculations for vertical loads R	equired					X	
5.21 Structural calculations for lateral R loads, for equipment weighing more than 400 lbs.	equired					X	X
5.22 Equipment manufacturer's catalogue "cut sheets" or specifications	P 🗆 NA	\	X	X	X	X	X
5.23 Outside air (OSA) calculations	P D NA	\				X	X
5.24 Smoke-control calculations	P D NA	\				X	X
5.25 Combustion-air calculations	P 🗆 NA	\				M	X
5.26 Fuel-gas-piping sizing calculations 🔲	P 🗆 NA	\				X	X
5.27 Make-up air calculations	P 🗆 NA	\				M	X
5.28 Energy-code-compliance forms	P 🗆 NA	\				X	X
5.29 Boiler information	P 🗆 NA	\ \				X	X
SECTION 6 - MECHANICAL: REPLACEMENT	NT ROO	FTOP EQU	JIPMENT	INSTALLAT	ION PERM	MITS I	DATA
Construction Documents							
6.1 Roof plan R	equired						X
6.2 Roof framing plan	P 🗆 NA	\ \					X
6.3 Fuel gas-piping plan	P 🗆 NA	\ 					X
6.4 Roof access details	P 🗆 NA	\ \					X
Supporting Documents							
6.20 Structural calculations for vertical loads R	equired						X
6.21 Structural calculations for lateral R loads, for equipment weighing more than 400 lbs.	equired						X
6.22 Equipment manufacturer's catalogue uccurrence cut sheets" or specifications	P 🗆 NA	\					X
6.23 Fuel-gas-piping sizing calculations	P D NA	\					
6.24 Energy-code-compliance forms	P D NA	\					X
Sether Sether							
Construction Documents							
7.1 Site plan R	equired						X
7.2 Floor plan(s) R	equired						X



			Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
7.3 Kitchen equipment plan	Req	uired						X
7.4 Kitchen equipment and hoo	d elevations Req	uired						
7.5 Roof plan	□P	□NA						
7.6 Cross-sections through ho ducts and shafts	ods 🗆 P	□NA						X
7.7 Fire-rated construction det	ails □ P	□NA						M
7.8 Fire-suppression details	□P	□NA						
Supporting Documents								
7.20 Structural calculations for v	ertical loads Req	uired						M
7.21 Structural calculations for loads, for equipment weigh more than 400 lbs.		uired						ă
7.22 Make-up air calculations	Req	uired						X
7.23 Equipment manufacturer's "cut sheets" or specificatio		□ NA						X
7.24 Hood/grease extractor listi documentation	ng 🗅 P	□ NA						X
7.25 Hood/grease duct sizing ca	alculations 🗆 P	□ NA						
7.26 Fire suppression information	on \square P	□ NA						X
SECTION 8 - PLUMBING DA	TA							
Construction Documents								
8.1 Floor plan(s)	Req	uired					X	M
8.2 Piping and material sched	ule Req	uired					X	×
8.3 Equipment layout plan	Req	uired					X	×
8.4 Fixture schedule	Req	uired					X	×
8.5 Site utility plan	ПP	□NA		×	X	X	×	×
8.6 Building cross section	□P	□NA						×
8.7 Riser diagram	ПP	□NA					×	M
8.8 Roof plan	ロР	□NA					X	M
8.9 Backflow-prevention locati	on 🗆 P	□NA						M
8.10 Irrigation plan	ПP	□ NA					×	×
8.11 Fire-rated construction det	ails 🗆 P	□ NA					X	×
8.12 Under-slab plumbing plan	ПP	□NA			X	X	X	X



			Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
Supporting Documents								
8.20 Structural calculations for vertical load	s Req	uired					×	×
8.21 Structural calculations for lateral loads, for equipment weighing more than 400 lbs.	Req	uired					X	M
8.22 Equipment manufacturer's catalogue "cut sheets" or specifications	□P	□ NA					M	M
8.23 Utility maintenance agreements	ロР	□NA	. 🗆				X	X
8.24 Water-supply calculations	ПP	□NA	. 🗆					X
8.25 Sanitary system calculations	ПP	□ NA	. 🗆					X
8.26 Irrigation-demand calculations	ロР	□ NA	. 🗆				X	
8.27 Roof drain and storm-water calculations	□P	□ NA					X	X
SECTION 9 - ELECTRICAL DATA								
Construction Documents								
9.1 Number of sets of plans	Req	uired					×	×
9.2 Floor plan(s)	Req	uired					X	×
9.3 One line diagram	Req	uired					X	×
9.4 Feeder riser diagram	Req	uired					M	M
9.5 Available fault current information	Req	uired					M	M
9.6 Panel schedule(s)	Requ	uired					X	M
9.7 Site electrical plan	ロР	□NA	. 🗆	M	X	M	X	X
9.8 Fire-rated-construction details	ロР	□NA	. 🗆				X	X
9.9 Lighting plan	ロР	□NA	. 🗆				X	X
9.10 Emergency power system and emergency lighting plan	ПP	□ NA	. 🗆				M	M
9.11 Under-slab electrical plan	ПP	□NA	. 🗆		X	X	X	M
Supporting Documents								
9.20 Structural calculations for vertical load	s Req	uired					M	×
9.21 Structural calculations for lateral loads, for equipment weighing more than 400 lbs.	Requ	uired					M	M
9.22 Energy-code-compliance forms and calculations for lighting	ПP	□ NA					X	X
9.23 Emergency power system specifications	□P	□ NA					M	X



9.25 Lighting equipment catalogue					Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
"cut sheets" or specifications SECTION 10 - FIRE SUPPRESSION DATA Construction Documents 10.1 Floor plan(s)	9.24	Feeder riser information	ПP	□NA						X
10.1 Floor plan(s)	9.25		□P	□NA		M	X	X	X	X
10.1 Floor plan(s)	SECT	TION 10 - FIRE SUPPRESSION	DATA							
10.2 Sprinkler piping plan(s)	Cons	truction Documents								
10.3 Site plan	10.1	Floor plan(s)	Req	uired					M	M
10.4 Standpipe information P NA	10.2	Sprinkler piping plan(s)	Req	uired					×	×
10.5 Backflow-prevention information	10.3	Site plan	ΠP	□NA		X	X	X	X	M
10.6 Reflected ceiling plan(s)	10.4	Standpipe information	ПP	□NA	. 🗖			×	X	X
10.7 Transverse and longitudinal	10.5	Backflow-prevention information	□P	□ NA					X	X
10.8 Fire-rated construction details P NA	10.6	Reflected ceiling plan(s)	□P	□ NA					ă	ă
10.9 Specialty fire suppression system	10.7		□P	□ NA					ă	×
plans and list of systems Supporting Documents 10.20 Structural calculations for vertical loads Required	10.8	Fire-rated construction details	ПP	□NA					X	X
10.20 Structural calculations for vertical loads Required	10.9		ПP	□ NA						X
10.21 Structural calculations for lateral loads, for equipment weighing more than 400 lbs. 10.22 Equipment manufacturer's catalogue "cut sheets" 10.23 Hydraulic calculations	Supp	orting Documents								
loads, for equipment weighing more than 400 lbs. 10.22 Equipment manufacturer's Required	10.20	Structural calculations for vertical loa	ds Req	uired					X	X
catalogue "cut sheets" 10.23 Hydraulic calculations	10.21	loads, for equipment weighing	Req	uired					X	×
10.24 Specialty fire-suppression-system	10.22		Req	uired					X	×
information SECTION 11 – FIRE DETECTION & ALARM DATA Construction Documents 11.1 Floor plan(s) Required	10.23	Hydraulic calculations	□P	□ NA				×	M	X
Construction Documents 11.1 Floor plan(s) Required	10.24		□P	□ NA						X
Required	SECT	TION 11 – FIRE DETECTION &	ALARI	/I DA1	ΓΑ					
11.2 Site plan	Cons	truction Documents								
11.3 Reflected ceiling plan(s)	11.1	Floor plan(s)	Req	uired					X	M
11.4 Transverse and longitudinal PNA D D D D D D D D D D D D D D D D D D D	11.2	Site plan	□P	□NA	. 🗖				X	X
cross section(s) 11.5 Wiring schematic	11.3	Reflected ceiling plan(s)	□P	□NA					X	X
5	11.4		ПP	□NA					X	M
11.6 Elevator recall information	11.5	Wiring schematic	□P	□NA	. 🗆				X	X
	11.6	Elevator recall information	ロР	□NA	. •				X	X
11.7 Operational matrix	11.7	Operational matrix	□P	□ NA						X



			Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
11.8 Fire-rated construction details	ПP	□ NA					M	X
11.9 Standard electrical notes	□P	□NA						X
Supporting Documents								
11.20 Structural calculations for vertical load	ls Req	uired						X
11.21 Structural calculations for lateral loads, for equipment weighing more than 400 lbs.	Req	uired						X
11.22 Equipment manufacturer's catalogue "cut sheets"	Req	uired					X	X
11.23 Installer certification information	Req	uired					X	X
11.24 Battery calculations	ПP	□ NA					X	X
11.25 Sample fire-alarm log book	ПP	□ NA					X	X
11.26 Emergency power system specifications	ПP	□NA					X	X
11.27 Monitoring certification information	□P	□NA						X
11.28 Voltage drop calculations	□P	□ NA					X	X
SECTION 12 - RE-ROOF INSTALLAT	ON D	ATA						
Construction Documents								
12.1 Site plan or building location map	Req	uired						X
12.2 Occupancy classification	Req	uired						X
12.3 Type of construction	Req	uired						X
12.4 Minimum roof class required	Req	uired						X
12.5 Class of roofing to be installed	Req	uired						
12.6 Roof plan	Req	uired						
12.7 Parapet and scupper cross section(s)	□ P	□NA						
Supporting Documents								
12.20 Pre-roof inspection report	Req	uired						
12.21 Roofing system listing information	Req	uired						
12.22 Roofing manufacturer's catalogue "cut sheets"	ПP	□NA						
12.23 Roofing manufacturer's installation instructions	Req	uired					٥	
12.24 Structural calculations	□P	□ NA						
12.25 Structural engineer's report	ПP	□NA						



	Excavation & shoring	Site utilities & grading	Foundation / slab	Structural frame	Shell	Build out/ TI
SECTION 13 – JURISDICTIONAL-SPECIFIC	REQUIREMENT	S DATA				
Construction Documents						
13.1						
13.2						
13.3						
13.4						
13.5						
13.6						
13.7						
13.8						
13.9						
13.10						